IDC MarketScape

IDC MarketScape: Worldwide AIOps 2026 Vendor Assessment

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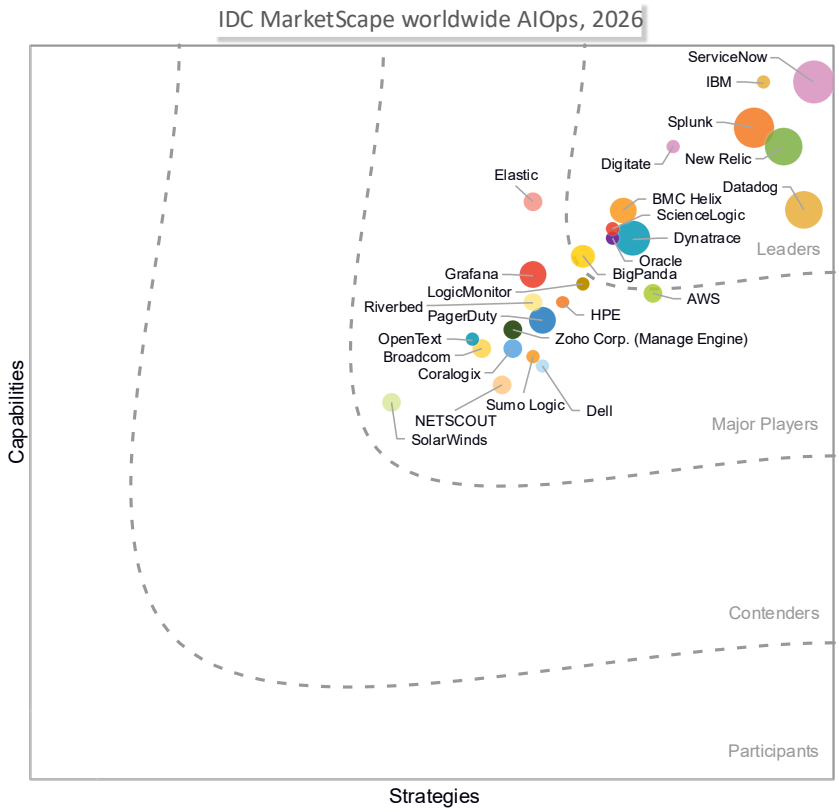
THIS IDC EXCERPTFEATURES NEW RELIC AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape worldwide AIOps vendor assessment



Source: IDC, 2026

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

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ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide AIOps 2026 Vendor Assessment (Doc # US54116226).

IDC OPINION

IDC TechBrief: AI Operations (AIOps) (IDC #US53955125, December 2025) suggests that AIOps is more than just applying whatever the latest automation approach is to the exponential complexity underlying the digital estate. Applying "AI" to operations problems is a tale as old as computing. Given that information technology (IT) is literally and practically the application of automation technology to problems, it's not a new kind of software to automate, well, anything.

Instead, AIOps software is software that allows information technology groups to shift to:

- **Describe** their desired environment and allow machines to use reasoning, guardrails, and best practices rather than *prescribe* the exact details of every possible digital element
- **Collaboratively** build policy and decision matrixes rather than rely on brittle executive procedures that prioritize the execution or prohibition of specific actions rather than results
- **Predict** the behavior of an exponentially complexifying system, including both intentional and unintentional actions, rather than react to whatever state it happens to be in at the moment
- **Additively** building toward the described, collaborative outcome, predicting the effect of changes, rather than restoratively reverting to "believed good" states

This is not a shift from "IT" to "business" value. It is a radical rethinking of what operations means in the new context, empowered by but not fundamentally because of AI.

Necessity is the mother of invention: So why "AI?"

Tools which precede need tend to wither and vanish. So, what then is the need that "AI" is addressing, and why do IT infrastructure and IT operations always show up as top use cases when IDC does surveys about potential AI usage?

On the one hand, there is the hype, the marketing machines, and the odd wandering around offices chanting "feel the AGI!" On the other hand, there are a number of real, persistent crisis that have shaped the operations of IT systems since at least 2008 and likely earlier. It is these latter that drive the consistent opportunity for value shown in IDC's global surveys.

The two most pressing issues of these are:

- First, information technology has, for at least the past decade and likely the past 20 years, been pushed by the growing complexity into a purely reactionary mode. Making the noise stop, even just for a moment, is the greatest thing we can do. Pushing out new "features" as fast as possible, in the moments between the fires, is the greatest achievement.

  This is not sustainable. It never was.

  At its root, this is a complexity problem. We needed tools that could take the exponentially increasing complexity, with its accompanying telemetry, and transform that into something humans could observe, orient on, make decisions about, and take actions.
- Second, the exponential complexity growth means that the system changed too fast for human reaction times. In a world where computers only do exactly what you tell them to do, humans have to account for every possible configuration, prescribe it in detail, and respond with the correct configuration in microseconds as the ephemeral/semistructured/stable technology stack changes.

  Human beings, even in groups, do not operate at that speed and scale with any level of precision. Under this kind of pressure, they tend to narrow their focus (specifically to tasks) and rely on procedural justice to ensure an acceptable outcome for the group rather than focusing creatively on outcomes.

These two pressing issues (among others) are the necessity driving the invention. AIOps companies, in particular with their focus on aiding IT departments, have an opportunity to make meaningful changes in the way that we work in, with, and for the digital estate.

What about digital business?

In IDC's 2025 *Future Enterprise Resilience and Spending Survey, Wave 8 and 9* (combined n = 1,897), 80% of respondents indicated they are a "digital business," with the remaining 20% having significant plans to complete their transformation into one. These businesses derive some or all of their revenue from digitally enhanced products and services, with 16% being digital natives that do not exist without their digital estate.

To a great extent, then, the operation of the digital estate is, in fact, the operation of the business. Or at least, it is a significant portion of the control and production systems that manage the delivery of the goods and services from which the enterprise derives its revenue.

How can a company operate (engage in business over time) when its primary means of doing so (the digital estate) is in a state of constant, epistemic chaos? How can a business plan for a month, a quarter, or a year when it isn't clear the lights will even come on tomorrow, or what the price will be when they do?

AIOperations, with its ability to move the machine-scale complexity and chaos back down to human scale and speed decision-making, help alleviate this challenge. This goes beyond just providing KPIs and suggests entirely new ways of doing business and potentially new operating models, even if "AGI" is never felt.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

Vendors were selected for this IDC MarketScape based on the following criteria:

- Operate and have clients in more than one geographic market (Americas, EMEA, Asia/Pacific, etc.)
- Provide the ability to respond to and automate the response to deviations from known good, architectural drift, and/or additively create a desired state for the digital environment
- Have developed an ecosystem of partnerships enhancing operational functionality
- Have an extended market presence sufficient to indicate they can sustain a mission-critical technology system for at least five years
- Have at least $100 million in revenue

ADVICE FOR TECHNOLOGY BUYERS

IDC recommends that technology buyers focus on the following when considering their AIOps strategy and the vendors to support it:

- **First, put out the fire.** If your teams are overwhelmed with signal, work with a vendor with a strong signal intelligence system to get it under control. If they are overwhelmed with changes pushed into the chaotic environment, work on that. An overwhelmed team does not have the neurological capacity to change and grow in the ways they will need to in order to really gain value from AIOperations tools.
- **Second, consider what you need.** You do not need "developers innovating" or any other buzzwords. Sit down and on a piece of paper answer:
  - What do we expect to happen day to day?
  - What actually happens day to day?
  - The difference between the two?

  Take time to work through them to sort out the "hows" from the "whats," the "whos," and the "whys." Also, remove jargon entirely — blunt, precise, and descriptive is the order of the day.
- **Third, consider how your digital business operates.** Every digital business is both a unique snowflake and, honestly, fairly standard. It's how those standard

components clip together, how they interact with the physical/social/procedural world that makes the snowflake, not the bits and bobbles themselves.

Set aside what you think you know about the business and really look. Who is the customer? How do they pull value out of the company? How does the digital estate resist or assist with that pull? How does it create the value they pull, intentionally or otherwise?

- **Fourth, decide on your change strategy.** This is not a reason to create a fancy slide deck. Instead, you have four choices:
  - **Do the same thing with the old tools:** Here you are going to try to lead forward with your existing tools and skills, somehow creating new outcomes.
  - **Do the same thing with new tools:** Here you will buy new tools and try to fit them into your current way of doing business, expecting that changing the tool will give better outcomes.
  - **Do new things with the old tools:** Here you are betting that your existing tools and partnerships are radically underutilized and that you will be able to change people's behaviors while maintaining a consistent environment.
  - **Do new things with new tools:** In this case, you will use the momentum and energy from introducing new tools to try to create new behaviors. This is, however, very difficult if you have not completed the first three steps, as it requires enormous trust and the ability (not the desire, most people have that) built up in the environment to change.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

New Relic

New Relic is positioned in the Leaders category in this 2026 IDC MarketScape for worldwide AIOps.

New Relic delivers an intelligent observability platform positioned as an operational decision environment that helps teams define SLO-driven outcomes, balance reliability and cost, and operationalize AI-guided remediation across hybrid estates. The company provides resources and support in North America, Western Europe, APAC excluding mainland China, the Middle East and Africa, and South America.

Strengths

New Relic supports outcome-centric decision operations that differentiate prescriptive platforms from basic signal aggregation. Service-level management with configurable SLOs for uptime, latency, and error rates enables teams to define and track operational outcomes. Pathpoint business journey modeling links technical performance to revenue and transaction costs, highlighting trade-offs between reliability and unit economics for cross-functional prioritization.

Predictions forecast resource exhaustion and SLO breaches, allowing teams to anticipate the consequences of scaling or configuration changes. Agentic integrations pre-populate ServiceNow tickets and GitHub or IDE-based assistants with contextual recommendations grounded in runbooks via retrieval-augmented generation. This approach blends human expertise with machine inference, embedding intelligent workflows directly into existing engineering tools and practices.

OpenTelemetry-first ingestion with OTLP endpoints, W3C Trace Context propagation, and centralized pipeline governance through New Relic Control support multisignal MELT ingest with pre-ingest filtering, enrichment, and tiered routing, lowering lock-in risk. The vendor offers hundreds of integrations across infrastructure, applications, security, and business tools, complemented by NerdGraph GraphQL APIs, Observability-as-Code guides, deployment templates, and customer success programs that emphasize measurable productivity gains.

New Relic AI uses large language models with retrieval-augmented generation across knowledge graphs and incident histories to deliver plain language explanations and decision pathways with confidence scoring and audit trails. Human-in-the-loop controls, approval gates, and example workflows for automated rollbacks demonstrate how teams can combine rapid automation with explicit authorization and post-change verification patterns.

Challenges

Outcome capture and collaborative prioritization still require more native workspace capabilities to reach full maturity. While service-level management and Pathpoint provide templates for objectives, available evidence gives limited detail on how cross-functional teams across SRE, security, finance, and business operations jointly surface conflicting goals, record decision rationales, and preserve priority history for audit without relying on custom dashboards or external artifacts.

Prescriptive guidance and impact prediction lack fully described simulation features that would clearly separate directive AIOps from advanced correlation. Predictions can forecast resource exhaustion and possible SLO breaches, and agentic integrations can propose remediation steps, but current documentation does not outline built-in what-if modeling that

compares alternative actions and blast radius before execution. Many teams must still rely on spreadsheets or external tooling for scenario analysis.

Governance constructs for workflow automation are evolving but not yet comprehensively documented at the platform level for regulated environments. Workflow automation supports approval gates, conditional branching, and reference implementations for change-triggered rollbacks via Slack approvals and AWS Systems Manager, yet public materials are less explicit about out-of-the-box separation-of-duties patterns, standardized post-change SLO validation, and configurable "action firewalls" that limit automation cascades without explicit release authority.

Organizations with strict regulatory or corporate governance requirements should therefore assess whether New Relic's current workflow patterns and policy controls align with their risk appetite. Some customers may need to implement additional custom logic, external policy engines, or independent change approval processes to enforce stricter guardrails, including formal change advisory reviews, dual-control approvals, and automated rollback triggers tied to SLO or error budget breaches.

Consider New Relic When

Consider New Relic when unified OpenTelemetry-based telemetry, AI-driven correlation that compresses alert noise, and an extensive integration ecosystem are priorities. The platform is particularly relevant for organizations seeking to move from reactive incident response toward intelligent observability that links business journeys, SLOs, and AI-guided workflows while being willing to complement New Relic's outcome workspaces and simulation gaps with custom collaboration tooling and governance patterns where required.

APPENDIX

Reading an IDC MarketScape graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category

focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

Given the weighting and scoring methodologies used, readers should pay particular attention to the "center line," where vendors have balanced their tactical capabilities with their strategic vision, and demonstrate the ability to do so consistently over time.

IDC MarketScape methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market definition

AIOps (AI operations or AI-fueled operations) platforms provide enterprises with human-interactable, collaborative workspaces in which they can:

- Identify key outcomes for their digital operations
- Organize and prioritize those outcomes to enable conflict resolution
- Describe those outcomes and prioritization in sufficient detail that agentic AI can propose prescriptive guidance
- Predict the impact of proposed guidance(s) either in sequence or as set of connected scenarios
- Implement the selected guidance alongside or in place of human action

AIOps platforms, much like their related observability counterparts, were originally targeted at xOps personas. However, increasingly, security, business operations, and finance personas are also involved in the performance of the digital estate over time (digital operations).

These platforms generally also provide access to a wide range of IT automation and configuration tools and increasingly both access other systems and provide access to their own automations through Model Context Protocol (MCP) and agent-to-agent protocols

(A2A). Many access older implementations through a combination of APIs, webhooks, and other coded interfaces.

AIOps platforms access observation platforms or gather from open source/standards-based telemetry in order to gather the data needed for their in-built knowledge graphs or world maps. These knowledge graphs/world maps then inform the actions of swarms of agents, only some of which are immediately exposed to the end user.

LEARN MORE

Related research

- *IDC PeerScape: Practices for Implementing Agentic AI–Enabled Intelligent Infrastructure* (IDC #US53988626, February 2026)
- *IDC TechBrief: AI Operations (AIOps)* (IDC #US53955125, December 2025)
- *IDC Special Report: Insights from Early Users of Agentic AI for Intelligent Infrastructure* (IDC #US53897125, November 2025)
- *IDC TechBrief: AI Factories* (IDC #US53807125, October 2025)

Synopsis

The IDC study provides a comprehensive evaluation of leading AIOps platforms, highlighting their ability to transform digital operations through outcome-centric decision-making, AI-driven guidance, and governed automation. The study details vendor strengths, challenges, and fit for various enterprise needs, emphasizing the shift from reactive IT management to proactive, business-aligned operations. It underscores the necessity of AIOps in managing exponential complexity and enabling sustainable, value-driven digital transformation.

"In a world where digital chaos outpaces human reaction, AIOps is not about automation. It requires a radical rethinking of operations, empowering teams to create outcome-driven, collaborative decision-making. Are you ready to redefine what operational intelligence means for your business?" asked Shannon Kalvar, research director, Enterprise Systems Management, Observability, and AIOps.

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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